

## PROCEDURE FOR TERMINATION OF JOINT TENANCY UPON A DEATH

It may be desirable to consult an attorney because of the legal aspects involved in changing the public record of ownership.

Documents which may be recorded to give public notice of the death of a joint tenant and thus clear record title of the deceased person's interest are:

1. DECREE ESTABLISHING FACT OF DEATH
  - a. This requires a court action to be filed.

OR

2. AFFIDAVIT-DEATH OF JOINT TENANT
  - a. Form is obtainable at stationery stores.
  - b. Form should be accompanied by the DEATH CERTIFICATE obtainable from the County Recorder in the county where death occurred
  - c. Information to complete the Affidavit-Death of Joint Tenant form may be obtained from the grant deed.
  - d. Preliminary Change of Ownership Report.

The Recorder's Office cannot assist you in obtaining, completing or notarizing any forms for recording.

COMPLETED DOCUMENTS SHOULD BE SENT TO THE COUNTY WHERE THE PROPERTY IS LOCATED.

FOR SAN BERNARDINO COUNTY THE ADDRESS IS:

County Recorder  
222 W. Hospitality Lane  
San Bernardino, CA 92415-0022  
(909) 387-8306

### RECORDING FEES

#### AFFIDAVIT-DEATH OF JOINT TENANT

For information regarding recording fees of your documents, please contact the County Recorder's Office.

The recording of the affidavit removes the decedent's name from the title to the property, leaving it stand in the name of the surviving tenant only. You will not be issued a new deed.

If you have any further questions, please contact the Recorder's Office at (909) 387-8306.

**DONALD E. WILLIAMSON**  
**ASSESSOR**

COUNTY OF SAN BERNARDINO  
172 West Third Street  
San Bernardino, CA 92415-0310  
(909) 387-6756

**CHANGE IN OWNERSHIP STATEMENT - DEATH OF REAL PROPERTY OWNER**

*(Filed pursuant to Section 480b of the Revenue and Taxation Code)*

INSTRUCTIONS: Complete a separate form for each property. Upon completion, mail this form to:  
Office of Assessor, 172 West Third Street, San Bernardino CA 92415-0310

1. Name of Decedent \_\_\_\_\_

2. Date of Death \_\_\_\_\_

3. Street Address of Property \_\_\_\_\_

4. Assessor's Identification Number (*parcel number*): \_\_\_\_\_

5. Descriptive information (*check A, B or C, if applicable*):

- A ☐ Attached is copy of deed by which decedent acquired title.  
B ☐ Attached is copy of most recent tax bill.  
C ☐ Deed or tax bill is not available; attached is the legal description.

6. Disposition of Real Property will be by (*check one*):

- A ☐ Intestate Succession  
B ☐ PC 650 Distribution  
C ☐ Affidavit of Death of Joint Tenant  
D ☐ Decree of Distribution Pursuant to Will  
E ☐ Action of Trustee Pursuant to Terms of a Trust

7. Transferee Information (*check A, B or C, if applicable*):

- A ☐ Transfer is to decedent's spouse (*check even if Affidavit of Death of Joint Tenant is to be recorded*). Name of Spouse  
B ☐ Transfer is to a Trust of which the spouse is the sole beneficiary or the income beneficiary.

Name of Spouse \_\_\_\_\_

- C ☐ Transfer is to decedent's nonspousal beneficiaries (*where known, indicate names of beneficiaries and the percentage of ownership interest each is to receive*).

\_\_\_\_\_

- D ☐ Transfer is to decedent's parent or child.

8. Name and mailing address for tax correspondence during pendency of the probate of decedent's estate.

\_\_\_\_\_

\_\_\_\_\_

9. Sale Prior to Distribution (*check if applicable*):

- ☐ This property has been sold or will be sold prior to distribution. (*Where appropriate, attach the conveyance document and/or court order.*)

DATE

TELEPHONE NO.

PRINT NAME

\_\_\_\_\_

ADDRESS (*STREET*)

SIGNATURE OF TRANSFEE, REPRESENTATIVE, ADMINISTRATOR OR EXECUTOR

(*CITY, STATE, ZIP CODE*)

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